



SECTION 9

Performance Measures

9.1 The Agency Performance Measure Estimates report (B11)



What is the Agency Performance Measure Estimates report?



Agencies must submit an Agency Performance Measure Estimates report (B11). This report will show, for each major agency goal and related performance measure in the agency's strategic plan:

- The actual performance levels attained for fiscal years 2000 through 2002 and the estimate for Fiscal Year 2003.
- The estimated performance levels for fiscal years 2004 and 2005 at the carry-forward level.
- The estimated performance level for fiscal years 2004 and 2005 for each maintenance level 1 (ML1) or performance level decision package. This level should represent the incremental performance level expected to be obtained if the decision package is enacted.
- The total estimated performance levels for fiscal years 2004 and 2005 for maintenance level 1 and performance level, assuming all proposed decision packages are enacted.

An example of a completed report is shown in Appendix A-6.

BDS and PMTES are used to generate the report

Agencies will use both the Performance Measure Tracking and Estimate System (PMTES) and the BDS system to generate the report. PMTES is also used by agencies to report quarterly progress on performance measures. Please contact Vicki Rummig at (360) 725-5268 for information about or access to the system.

How to generate the report

The table below shows the steps involved in producing the Agency Performance Measure Estimates report (B11) and which system is used for each step.

Establish descriptions in PMTES first

The first step is to establish current mission and goal statements, as well as performance measure descriptions, in PMTES. Be sure that they match goals and performance measures included in the paper version of the agency strategic plan submitted elsewhere in the agency budget submittal to OFM. Please do not delete or modify previously published mission statements, goal statements, and performance measure descriptions and amounts. If you would like to link an existing measure to a newly created goal, use the “Copy Performance Measure Function.”

Don't delete previously published information

For each measure that will be included in the Agency Performance Measure Estimates Report, set the flags in PMTES to OFM Measure-Yes, Active Measure-Yes, Budget Measure-Yes, and Tracking Measure-No (only if not being tracked in the current biennium, “Yes” if currently being tracked).

Use BDS for decision package development

Agencies will develop individual decision packages in BDS and will note as part of the decision package the expected incremental changes to performance results if that package is implemented.

When the agency has selected a budget version for submittal, it must then use PMTES to link to this BDS version. This will enable PMTES to automatically list the decision packages related to each performance measure on the Agency Performance Measure Estimates report.

After finishing work in BDS, use PMTES for producing the report and use the BASS budget data release function to release budget amounts to OFM

Agencies will use PMTES for producing the Agency Performance Measure Estimates report. PMTES will list the title of each decision package related to each performance measure. Agencies will then need to manually enter the sum of the performance measure estimates for each line; the system does not perform these computations. The performance measure estimates should show the cumulative effect of each added package. Use the Performance Measures Reports function in PMTES to print the report. Refer to the BASS Budget Data Release Quick Reference Guide for information on releasing the budget amounts to OFM (<http://bass.ofm.wa.gov/basspr/library/PM-BudRel.pdf>; <https://services-bass.ofm.wa.gov/basspr/library/PM-BudRel.pdf> for Fortress users).

System Functions for Creating the Agency Performance Measures Report (B11)

Function	PMTES	BDS
Establishing goal statements	X	
Establishing performance measures descriptions	X	
Establishing decision packages		X
Creating new budget versions		X
Linking performance measures to decision packages		X
Establishing incremental performance estimates for decision packages		X
Linking to the BDS budget version for performance measure budget amounts entry, reporting, and release	X	
Establishing annual budget estimates and actuals for the B11	X	
Printing the Agency Performance Measure Estimates report (B11)	X	

OFM's Part 1 instructions provide guides and resources for developing measures

The Part 1 instructions contain more information on how to develop and modify the performance measures themselves. The appendices include performance measure guides and examples, as well as a selected source list.

9.2 How to avoid common performance measure errors**Reminders**

- Make sure you have entered the agency's current mission statement in PMTES. Do not delete or modify previous versions.
- Be sure to enter current goal statements that match goal statements included in the strategic plan submitted with the agency's budget request. Do not delete or modify existing goal descriptions.
- Be sure to enter current performance measures that match measures included in the strategic plan submitted with the agency's budget request.
- Do not delete or modify previously published performance measure descriptions or tracking amounts.

- Remember to provide outcome measures, not just output measures.
- Don't use measures that are hard to understand. Try to avoid the use of jargon and acronyms in performance measure descriptions.
- Don't word performance measures as objectives.
- On the Agency Performance Measure Estimates report, show the incremental change in performance for each decision package.
- Prepare the final Agency Performance Measure Estimates report after the decision packages are finalized and prioritized.
- PMTES does no computations. You'll need to check for logic and accuracy.
- Format numbers with percentages, dollar signs, etc., as needed.
- Remember to release PMTES budget estimate data using the BASS budget data release function.